



ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

Age: 50 years	ARMENTA BURRIS , sister, was appointed conservator on 8/17/2005.	NEEDS/PROBLEMS/COMMENTS:
	Court Investigator Jennifer Young filed a Petition for Transfer on 11/25/14 to be heard on 01/15/15, requesting this proceeding be transferred to Tulare County because the conservatee has resided there for over five years.	CONTINUED FROM 06/04/15 Minute Order from 06/04/15 states: Counsel reports that there has been no contact from Ruth Ratzlaff, and that he requested verification of the funds in a letter sent by certified mail, which was signed for on 5/15/15. Ms. Burris represents that she last spoke to Ms. Ratzlaff in January of 2015, when she assured Ms. Burris that she would appear in Court at the January hearing. The matter is continued so that the Examiner can review the order; Ms. Burris need not appear on 6/18/15.
Cont. from 060415	No appearances were made at the 01/15/15 hearing and the Court set the matter for an Order to Show Cause on 03/05/15 and ordered that Ruth Ratzlaff and Armenta Burris both be personally present.	Note: Conservator was formerly represented by Ruth Ratzlaff.
Aff.Sub.Wit.		
Verified	On 03/05/15 , Attorney Ratzlaff did not appear and the Court ordered sanctions against her in the amount of \$1,000.00. Minute order from 03/05/15 states, in relevant part: The Court notes that Ms. Ratzlaff has not prepared the order requested years ago and has not appeared. The Court will not transfer the case to Tulare County without verification that the money is still in the trust account. Matter was continued to 04/30/15.	
Inventory		
PTC	On 04/30/15 , Stanley Teixeira appeared on behalf of Conservator Armenta Burris. Minute Order from 04/30/15 states: Mr. Teixeira is to prepare the order. The Court orders that a copy of the reporter's transcript filed 11/09/10 be made for Mr. Teixeira. Ms. Burris is to contact the state bar to ascertain whether or not the funds remain in the trust account.	
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
	Continued on Page 2	
		Reviewed by: JF
		Reviewed on: 06/15/15
		Updates:
		Recommendation:
		File 1 - Lee

Status Report/Declaration of J. Stanley Teixeira filed 05/29/15 states: at the hearing on 04/30/15, the Court ordered the preparation of an Order After Hearing incorporating matters from the Reporter's Transcript of a hearing occurring on 03/12/10. A copy of the transcript was obtained and a draft Order incorporating certain matters into the trust as suggested in the transcript. After preparing the draft Order, Master Trust of California was contacted to obtain a new and potentially updated "Joinder Agreement and Application for Admission with the Master Trust of California." Attorney Teixeira spoke with Robert G. Britton, the Trust Administrator/Trust Officer at Master Trust of California. He stated that since the hearing on 03/12/10, the Master Trust is using a new "court supervised trust document." He further informed that the following are required for Master Trust of California to be involved: A) venue for trust administration must be transferred to the San Bernardino Superior Court; B) approval of the fee schedule and approval to begin taking trustee fees upon funding; and C) approval of the investment of the funds according to the Investment Policy. He implied that these requirements are non-negotiable. **Copies of the new trust, fee schedule and investment policy attached.** The proposed Order After Hearing submitted is based on the foregoing.

At the same hearing on 04/30/15, the court ordered confirmation from the State Bar that certain funds continue to be held in the attorney-client trust account of attorney Ruth E. Ratzlaff. On 05/07/15, the State Bar was contacted and informed Mr. Teixeira that there is no way for the State Bar to verify the matter and suggested that inquiry be made directly with the attorney. On 05/13/15, a letter was sent to Ruth Ratzlaff via certified mail requesting verification that the funds continue to be held in her client trust account. On 05/18/15, a certified mail return receipt was received evidencing that the letter was received and signed for on 05/15/15. As of the date of declaration, no communication has been received from Ms. Ratzlaff about this matter. The amount that should be on deposit in Ms. Ratzlaff's client trust account is \$50,781.60. (\$54,793.10 less court approved reimbursements).

Petitioner: Dora Elia Navarro (pro per)

Petition for Termination of Guardianship

		DORA ELIA NAVARRO , guardian, is petitioner. Please see petition for details. Court Investigator Report filed on 5/20/15	NEEDS/PROBLEMS/COMMENTS:
Cont. from 052815			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
			Reviewed by: KT
			Reviewed on: 6/15/15
			Updates:
			Recommendation:
			File 2 - Varela

3 Nickole Celeste Pena (GUARD/P)**Case No. 05CEPR01052**Petitioner/mother: **Guadalupe Garcia (pro per)**Guardian: **Antonia C. Garcia (pro per)****Petition for Termination of Guardianship**

Age: 10 years DOB: 9/5/2004	GUADALUPE GARCIA , mother, is petitioner.	NEEDS/PROBLEMS/COMMENTS: Continued from 4/30/15. Minute order states Petitioner is ordered to provide a contact number to the Court Investigator. Examiner notes provided in open court.
	Please see petition for details.	
Cont. from 043015		
<input type="checkbox"/> Aff.Sub.Wit.	Court Investigator Report filed on 4/22/15	
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory	Court Investigator Supplemental Report filed on 6/10/15	
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input type="checkbox"/> Notice of Hrg		
<input type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: KT
		Reviewed on: 6/15/15
		Updates:
		Recommendation:
		File 3 - Pena

Attorney: Linda K. Durost (for Petitioner/Administrator Toni Richardson)

First and Final Report and Account of Administrator; for Allowance of Statutory Fees and Costs; Allowance of Statutory Administrator's Fees and for Final Distribution Attorneys'

DOD: 6/13/11		TONI RICHARDSON , Administrator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period 2/22/12 – 2/2015	Continued from 5/7/15. Minute order states Mr. Huynh is appearing on behalf of an objector, advising that he was just retained. Ms. Durost will be filing an amended petition. If the amended petition is filed, this matter will come off calendar.
Cont. from 050715			
<input type="checkbox"/>	Aff.Sub.Wit.	Accounting - \$172,500.00	NEED AMENDED ACCOUNTING based on but not limited to the following: 1. This estate was opened using a fee waiver. Filing fees are considered costs of administration. Therefore, the filing fee of \$435.00 is now due. 2. Corrected Inventory and Appraisal filed on 2/10/15 was not completed by the probate referee as required. 3. Creditor's Claim of DMC filed on 4/27/12 in the amount of \$358.63 was not addressed. Need Allowance or Rejection of Creditor's Claim. 4. Escrow closing statement shows that the Administrator received \$110,594.07 from the sale of the real property. The proceeds were ordered into a blocked account. Receipt for Blocked account shows a deposit of \$105,594.07. A difference of \$5,000. Need explanation. 5. Petition states all funds were held in an interest bearing account; however, there is no interest listed.
<input checked="" type="checkbox"/>	Verified	Beginning POH- \$172,500.00	
<input checked="" type="checkbox"/>	Inventory	Ending POH - \$106,106.46	
<input checked="" type="checkbox"/>	PTC	Attorney - \$4,393.00	
<input checked="" type="checkbox"/>	Not.Cred.	Administrator- \$4,393.00	
<input checked="" type="checkbox"/>	Notice of Hrg	Attorney costs- \$435.00 (filing fee)	
<input checked="" type="checkbox"/>	Aff.Mail	Administrator costs/creditor's claim - \$22,964.00	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters	2/22/12	
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input checked="" type="checkbox"/>	FTB Notice		

Distribution, pursuant to intestate succession, is to:

Toni Richardson- \$36,960.73
Bill Richardson- \$36,960.73

Reviewed by: KT

Reviewed on: 6/15/15

Updates:

Recommendation:

File 6 - Bonham

6. Warren Felger was the former attorney in this case. Therefore he is entitled to a portion of the statutory attorney fees. Need agreement from the attorneys as to apportionment of the attorney fees.
7. Accounting should begin with the property on hand on the date of death. Therefore the beginning property on hand should be \$178,080.00.
8. Statutory fees are calculated incorrectly. The correct fee base should be \$172,550 (\$178,500.00, Inventory and appraisal partial no. 1, filed on 4/16/13 plus \$2,550.00, corrected inventory and appraisal filed on 2/10/15 less \$5,500.00 loss on sale of real property. Therefore the correct statutory fee is \$6,450.00.
9. Petition states Petitioner/Administrator submitted and approved her own creditor's claim in the amount of \$22,964.00. Creditor's claims of the personal representative or their attorney must be submitted to and approved by the court. Probate Code §9252. It should be noted that the charges listed are for upkeep of the property during the administration therefore it is not a creditor's claim but a cost of administration and should be included in the accounting as such.
10. Creditor's claim of Toni Richardson includes a payment to herself of \$200 on 1/26/12 without identifying what this payment is for.
11. Creditor's claim of Toni Richardson includes several charges to DMV that need clarification (noting that there is only one vehicle in the estate, a 1998 Saturn that petitioner distributed to herself):
 - a. An unidentified date sometime in April 2012 – Car tags - \$173.50
 - b. 7/28/12 – car tags - \$31.00
 - c. 10/2/12 – DMV - \$100.00
 - d. 5/13/13 – Cash DMV - \$153.00
 - e. 5/7/13 – DMV renewal - \$157.00
12. Creditor's claim of Toni Richardson includes an entry on 3/10/13 for \$500 to Warren Felger for filing fees. This item needs more information. Filing fees for what?
13. Creditor's claim of Toni Richardson includes a payment of \$554.00 to Advanced Court Services – Paralegal. This does not appear to be a reimbursable cost.
14. Disbursement schedule must be itemized and comply with Probate Code §1062(b)
15. Petitioner states she distributed the jewelry valued at \$500.00 to her brother/beneficiary Bill Richardson and the 1998 Saturn valued at 1,550.00 to herself; however, there are no offsets in the distribution and the remaining cash is being distributed 50% to each beneficiary. Declaration of Toni Richardson filed on 4/14/15 states she split the jewelry between herself and her brother, Bill Richardson. Need clarification, was the jewelry distributed to Bill or was distributed equally between Bill and Toni?
16. Declaration of Toni Richardson filed on 4/14/15 states there was a travel trailer valued at \$5,000.00 that was sold prior to the decedent's death. The proceeds of the sale were given directly to Bill Richardson, again prior to the decedent's death. Petitioner states as an offset to the \$5,000 gift to her brother she took the 1998 Saturn. Gifts made prior to the death of the decedent should not be considered during the administration of this estate. Therefore, Bill Richardson would be entitled to ½ of the vehicle.
17. Declaration of Toni Richardson filed on 4/14/15 states she put the decedent's belongings in storage and subsequently sold them for \$900 using the \$900 for miscellaneous expenses of the administration. The \$900 should be included in the accounting along with any expenses of administration paid.

		<p>BRUCE BICKEL, Trustee with bond of \$464,792.37, is Petitioner.</p> <p>Account period: 5/1/13 – 2/28/15 Accounting: \$440,026.85 Beginning POH: \$398,884.56 Ending POH: \$396,608.60 (\$53,766.66 cash plus mutual funds)</p> <p>Petitioner states no compensation has been paid to the fiduciaries or their attorneys during this account period during this account period except as authorized by court orders entered 6/21/12 and 7/22/13.</p> <p>Trustee: On 6/21/12, the Court authorized Petitioner as Trustee to receive payments of fees each month at the rate of \$150/hour on his then-current hourly rate, not to exceed \$1,000/month. Petitioner has hired his son, Matt Bickel, who owns Matt Bickel Fiduciary Support Services, to provide case management services for the special needs trust for which Petitioner is the trustee. Matt Bickel is a licensed California fiduciary and he and his staff provide case management services at an hourly rate that is less than Petitioner's. The time spent by Matt Bickel Fiduciary Support Services is categorized as Trustee's Fees and both his fees and Petitioner's fees combined each month are subject to and in compliance with the payment limits set forth in the 6/21/12 order. At this time, there is no excess requested.</p> <p>Attorney: \$4,145.00 (for 8 attorney hours @ \$210-260/hr and 16 paralegal hours @ \$95-140/hr for services including preparation and finalizing and service of the first account and notice of entry of order, attending hearing, preliminary preparation of this second account, per Declaration filed 5/4/15)</p> <p>Costs: \$200.00 (filing)</p> <p>Petitioner prays for an order:</p> <ol style="list-style-type: none"> 1. Settling, allowing, and approving the Second Account as filed; 2. Ratifying, approving and confirming all acts and transactions of Petitioner as set forth in it; 3. Authorizing attorney fees and costs; 4. And for such other and further orders as the Court may deem proper. 	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>SEE ADDITIONAL PAGES</u></p>																																																																			
<table border="1"> <tr><td></td><td>Aff.Sub.Wit.</td><td></td></tr> <tr><td>✓</td><td>Verified</td><td></td></tr> <tr><td></td><td>Inventory</td><td></td></tr> <tr><td></td><td>PTC</td><td></td></tr> <tr><td></td><td>Not.Cred.</td><td></td></tr> <tr><td>✓</td><td>Notice of Hrg</td><td></td></tr> <tr><td>✓</td><td>Aff.Mail</td><td>W</td></tr> <tr><td></td><td>Aff.Pub.</td><td></td></tr> <tr><td></td><td>Sp.Ntc.</td><td></td></tr> <tr><td></td><td>Pers.Serv.</td><td></td></tr> <tr><td></td><td>Conf. Screen</td><td></td></tr> <tr><td></td><td>Letters</td><td></td></tr> <tr><td></td><td>Duties/Supp</td><td></td></tr> <tr><td></td><td>Objections</td><td></td></tr> <tr><td></td><td>Video Receipt</td><td></td></tr> <tr><td></td><td>CI Report</td><td></td></tr> <tr><td>✓</td><td>2620(c)</td><td></td></tr> <tr><td>✓</td><td>Order</td><td></td></tr> <tr><td></td><td>Aff. Posting</td><td></td></tr> <tr><td></td><td>Status Rpt</td><td></td></tr> <tr><td></td><td>UCCJEA</td><td></td></tr> <tr><td></td><td>Citation</td><td></td></tr> <tr><td></td><td>FTB Notice</td><td></td></tr> </table>					Aff.Sub.Wit.		✓	Verified			Inventory			PTC			Not.Cred.		✓	Notice of Hrg		✓	Aff.Mail	W		Aff.Pub.			Sp.Ntc.			Pers.Serv.			Conf. Screen			Letters			Duties/Supp			Objections			Video Receipt			CI Report		✓	2620(c)		✓	Order			Aff. Posting			Status Rpt			UCCJEA			Citation		
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		<p>Reviewed by: skc</p> <p>Reviewed on: 6/15/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 7 - Malos</p>																																																																				

NEEDS/PROBLEMS/COMMENTS:

1. Need itemization for trustee fees paid. Note: The petition does not state in the narrative the amount of trustee's fees paid. Disbursements Schedule indicates \$14,450.67 paid to Bruce Bickel and \$1,019.94 paid to Matt Bickel Fiduciary Support Services, a total of \$15,470.61 for this 20-month account period. The Court may also require future petitions to clearly state what was paid in the narrative of the petition.
2. Notice of Hearing was served on John Malos, as Angela's father and guardian ad litem; however, Cal. Rule of Court 7.51 requires direct notice, even to a minor. The Court may require direct notice of hearing to be served on the beneficiary for this petition or in the future.
3. The trustee's current bond is \$464,792.37. Based on the receipt and property on hand figures at the close of this account period, it appears bond should be increased to at least \$481,525.98.
4. Need clarification re reimbursement of \$5.60 in mailing charges to Allison Ross. Who is Allison Ross, and what are the mailing charges for? Pursuant to Local Rule 7.17, this type of expense is considered a cost of doing business and is not typically reimbursable.
5. The 4/20/12 Order Establishing Trust authorized investment in mutual funds and US government bonds with maturity dates greater than five years. For this account period, receipts and gains on sales, less losses, totaled \$40,764.92. Disbursements, which include disbursements for the beneficiary as well as trustee and account management fees, totaled \$43,040.88, exceeding the receipts by \$2,275.96.

More specifically, gains of \$7,176.94 less losses of \$377.37 result in an overall gain of \$6,799.57 for this account period. In addition to the trustee fees, \$9,840.51 was paid to Merrill Lynch Wealth Management, an amount which exceeded the gains by \$3,040.94. The Court may require clarification as to the investment in the best interest of the beneficiary.

DOD: 9-21-12	<p>ROSARIO R. FORESTIERE, Spouse, was appointed as Administrator with Limited IAEA without bond on 1-3-13 and Letters issued on 1-7-13.</p> <p>At hearing on 1-3-13, the Court set this status hearing for the filing of the first account or petition for final distribution.</p> <p>Status Report filed 3-11-14 by Mr. Forestiere's former attorney Robert Wright states that a will has now been discovered and a Petition for Probate of Will is in process. The assets of the estate include the decedent's home, personal vehicle, and personal effects. On 12-31-13, the Court approved the sale of the residence and it is currently in escrow. The estate is not in a condition to be closed until the will has been admitted and escrow has closed.</p> <p>Update: On 6-26-14, the will was admitted to probate and Rosario R. Forestiere was appointed as Executor.</p> <p>The Court continued this status hearing re filing the first account or petition for final distribution to 9-18-14.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need first account or petition for final distribution or verified written status report per local rule.</p>
Cont. from 032114, 042814, 052814, 062614, 091814		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
<p>Reviewed by: skc</p> <p>Reviewed on: 6/12/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 8A – Forestiere</p>		

9 Scott Douglas Kallam (Estate)**Case No. 13CEPR00574****Attorney: Heather H. Kruthers (for Petitioner/Administrator Public Administrator)****First and Final Account and Report of Administrator and Petition for Allowance of Ordinary and Extraordinary Commissions and Fees and for Distribution.**

DOD: 6/16/13		PUBLIC ADMINISTRATOR , Administrator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 8/13/13 – 3/26/15	
Cont. from		Accounting - \$215,465.01	
<input type="checkbox"/>	Aff.Sub.Wit.	Beginning POH - \$194,521.47	
<input checked="" type="checkbox"/>	Verified	Ending POH - \$ 18,511.19	
<input checked="" type="checkbox"/>	Inventory	Administrator - \$7,309.30	
<input checked="" type="checkbox"/>	PTC	(statutory)	
<input checked="" type="checkbox"/>	Not.Cred.	Administrator X/O - \$1,248.00	
<input checked="" type="checkbox"/>	Notice of Hrg	(per Local Rule for sale of real property and preparation of taxes)	
<input checked="" type="checkbox"/>	Aff.Mail	Attorney - \$7,309.30	
	W/	(statutory)	
	Aff.Pub.		
	Sp.Ntc.	Bond fee - \$808.01	
	Pers.Serv.	(o.k.)	
	Conf. Screen	Court fees - \$486.00	
<input checked="" type="checkbox"/>	Letters	(filing fee, certified copies)	
	Duties/Supp		
	Objections	Distribution, pursuant to intestate succession, is to:	
	Video Receipt	Steve Kallam - \$91.56	
	CI Report	Paul Kallam - \$91.56	
<input checked="" type="checkbox"/>	9202	Donna Kincade - \$91.56	
<input checked="" type="checkbox"/>	Order	Wendy Reimer - \$91.56	
	Aff. Posting	Susan Stone - \$61.56	
	Status Rpt	Janice Butler - \$91.56	
	UCCJEA	Charles Stone - \$91.56	
	Citation	Gay Deady - \$91.56	
<input checked="" type="checkbox"/>	FTB Notice	Dale Zimmerman - \$91.56	
		Jeffrey Zimmerman - \$91.56	
			Reviewed by: KT
			Reviewed on: 6/15/15
			Updates:
			Recommendation:
			File 9 - Kallam

12 Robert Dean Snavely, Sr. (CONS/P)**Case No. 14CEPR00078****Attorney: Gary G. Bagdasarian (Court appointed for Conservatee)****Attorney: Catherine A. Amador (for Petitioner Brian Snavely)****Petition for Appointment of Probate Conservator of the Estate.**

Age: 84 years		BRIAN SNAVELY , son, is petitioner and requests BRUCE BICKEL be appointed as conservator of the estate with bond set at \$130,000.00.	NEEDS/PROBLEMS/COMMENTS: Court Investigator advised rights on 6/2/15. 1. Brian Snavely was represented by J. Stanley Teixeira in his petition to be appointed as conservator of the person. Need substitution of attorney. 2. Need citation. 3. Need proof of personal service of the citation on the conservatee, Robert Dean Snavely. 4. Need video receipt for Bruce Bickel.
DOB: 3/28/31			
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	BRIAN SNAVELY and BRAD SNAVELY , sons, were appointed co-conservator's of the person on 5/23/14. Please see petition for details. Court Investigator report filed on 6/10/15	
<input checked="" type="checkbox"/>	Aff.Mail		W/
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		X
<input checked="" type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation	X	
<input type="checkbox"/>	FTB Notice		

Probate Status Hearing re: Filing Inventory & Appraisal

DOD: 11/28/14	CRAIG COSTI , brother, was appointed Administrator with full IAEA and bond set at \$100,000.00 on 2/19/15.	NEEDS/PROBLEMS/COMMENTS:
		1. Need final inventory and appraisal or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.
Cont. from	Bond was filed on 1/26/15.	2. Bond does not appear to be sufficient. Inventory and appraisal lists the value of the real property at \$365,000.00. Petition for Probate indicated the property has encumbrances of \$207,000.00. Therefore the value of the estate to be bonded would be \$158,000.00. Current bond is \$100,000.00. Court may require the bond to be increased to \$158,000.00.
Aff.Sub.Wit.	Letters issued on 2/23/15.	
Verified		
Inventory	I & A, partial no. 1 was filed on 4/14/15 showing a value of \$365,000.00.	
PTC		
Not.Cred.		
Notice of Hrg	Minute order dated 2/19/15 set this status hearing for the filing of the inventory and appraisal.	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
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Aff. Posting		
Status Rpt		Reviewed by: KT
UCCJEA		Reviewed on: 6/15/15
Citation		Updates:
FTB Notice		Recommendation:
		File 14 - Costi

Probate Status Hearing re: Filing Inventory and Appraisal

DOD: 7/10/14	SUSAN TURNER was appointed Administrator with full IAEA and without bond on 2/19/15.	NEEDS/PROBLEMS/COMMENTS: Note: Examiner has not taken this matter off calendar. A Notice of Proposed Action was filed on 5/21/15 indicating the real property of the estate is set to be sold. The court may want to set another status hearing on July 29, 2015 at 9:00 a.m. in Dept. 303 for the filing of the receipt for blocked account for the proceeds of the sale of the real property.
Cont. from	Order for Probate indicates that the net proceeds from the sale of real property must be placed into a blocked account.	
Aff.Sub.Wit.		
Verified		
Inventory	Letters issued on 2/27/15.	
PTC		
Not.Cred.	Inventory and Appraisal, part 1 was filed on 4/17/15 showing a value of \$25,024.15.	
Notice of Hrg		
Aff.Mail		
Aff.Pub.	Inventory and Appraisal, part 2, final was filed on 4/17/15 showing a value of \$215,000.00.	
Sp.Ntc.		
Pers.Serv.		
Conf. Screen	Minute order dated 2/19/15 set this status hearing for the filing of the inventory and appraisal.	
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 6/15/15
		Updates:
		Recommendation:
		File 15 - Melville

Amended Petition to Determine Succession to Real Property (Prob. C. 13151)

DOD: 11/28/14		MARY ELIZABETH BROWN (Daughter) is Petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Petitioner indicates at #14 that she has two siblings, but requests that the estate pass to her alone. Pursuant to intestate succession (Probate Code §6400 et seq.), the estate would pass to all siblings equally. This estate cannot be distributed via summary proceeding unless all siblings petition together for the property to pass to them in equal shares. 2. Petitioner indicates at #1 and #13 that personal property is included in this petition; however, no personal property was inventoried. Need clarification. 3. The petition was filed with a fee waiver. If assets are distributed pursuant to this petition, the filing fee of \$435 will be due prior to entry of order for distribution. 4. Need order, completed with legal description of the real property (and personal property, if any).
		40 days since DOD	
		No other proceedings	
Cont from 051415			
	Aff.Sub.Wit.		
✓	Verified	I&A: \$65,000.00 (real property located at 1237 Irwin Ave., Fresno)	
✓	Inventory		
✓	PTC		
	Not.Cred.	Decedent died intestate	
✓	Notice of Hrg	Petitioner requests Court determination that the real (and personal?) property passes to her.	
✓	Aff.Mail	w/o	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order	x	
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 6/12/15
			Updates:
			Recommendation:
			File 16 – Battle-Doyle

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 7/25/14	ANITA MARIE FERGUSON , Named executor without bond, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. <u>Need clarification re Decedent's name:</u> Petitioner spells the decedent's last name "FLEMMING" on the petition, but elsewhere spells it "FLEMING." Note: The will appears to reflect "FLEMING" in the decedent's handwriting on Page 1. 2. Need Proof of Subscribing Witness signed by at least one witness. (Note: Petitioner filed a Proof of Subscribing Witness and a Proof of Holographic Instrument signed by herself; however, this is insufficient, as it does not appear that she is one of the subscribing witnesses, and further she is an interested party as sole heir.) 3. Need Notice of Petition to Administer Estate and proof of service on Anne Todd Cortez (sister) pursuant to Probate Code §8110. 4. Need proof of publication pursuant to Probate Code §8120. 5. This case was opened with a fee waiver. Please note that upon distribution, all Court filing fees will be due. <u>Note:</u> If granted, the Court will set status hearings as follows: <ul style="list-style-type: none"> Thurs Nov. 5, 2015 for filing the Inventory and Appraisal Thurs Sept. 8, 2016 for filing the first account or petition for final distribution. If the proper items are on file prior to the status hearing dates, the status hearings may be taken off calendar.
	Full IAEA – need publication	
Cont from 050715	Will dated 3/14/04	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified	Residence: Fresno	
<input type="checkbox"/> Inventory	Publication: Need publication	
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.	Estimated value of estate:	
<input type="checkbox"/> Notice of Hrg	Personal property: \$8,000.00	
<input type="checkbox"/> Aff.Mail	Real property: \$31,000.00	
<input type="checkbox"/> Aff.Pub.	(\$55,000.00 encumbered for \$24,000.00)	
<input type="checkbox"/> Sp.Ntc.	Probate Referee: Steven Diebert	
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		

Reviewed by: skc
Reviewed on: 6/12/15
Updates:
Recommendation:
File 17 - Flemming

Isaac Dominguez, Elijah Dominguez, Priscella Dominguez (GUARD/P)
Case No. 15CEPR00380

Attorney **Brungess, Julia (for Brenda & Teodoro Munoz – Petitioners)**
Petition - Appoint Guardian of the Person

Isaac, 7	<u>TEMPORARY EXPIRES 06/18/15</u>	NEEDS/PROBLEMS/COMMENTS:
Elijah, 6	BRENDA MUNOZ and TEODORO MUNOZ, non-relatives, are Petitioners.	<p><u>Note:</u> Per Notice of Unavailability of Counsel, attorneys Julia Ann Brungess and Teri Ann Kezirian, will be unavailable June 22, 2015, June 25, 2015, July 10, 2015 through and including July 20, 2015 for all purposes.</p> <p>1. Declarations of Due Diligence indicate that the Father, Thomas Dominguez, has not provided an address where he could be personally served, but did provide a mailing address and has had contact via telephone calls and text messages. If diligence is not found, need proof of personal service at least 15 days before the hearing of Notice of Hearing with a copy of the <i>Petition for Appointment of Guardian of the Person</i> <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for Thomas Dominguez (father).</p>
Priscella, 3	Father: THOMAS DOMINGUEZ – Served by mail on 06/03/15; Declaration of Due Diligence filed 06/05/15; copies of text messages informing him of hearing date attached	
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.	Mother: PRECILLA VILLA – Consent & Waiver of Notice filed 04/10/15	
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory	Paternal grandfather: MANUEL DOMINGUEZ – Served by mail on 04/29/15	
<input type="checkbox"/> PTC	Paternal grandmother: ODILIA DOMINGUEZ – Served by mail on 04/29/15	
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg	Maternal grandfather: RAY VILLA – Served by mail on 04/29/15	
<input checked="" type="checkbox"/> Aff.Mail	Maternal grandmother: MARIASALA MARAVILLO – Served by mail on 04/29/15	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.	Siblings: THOMAS DOMINGUEZ (8), ISABEL DOMINGUEZ (7)	
<input type="checkbox"/> Pers.Serv.	Petitioners state [see petition for details].	
<input checked="" type="checkbox"/> Conf. Screen	Court Investigator Charlotte Bien filed a report on 06/04/15.	
<input checked="" type="checkbox"/> Letters	Court Investigator Charlotte Bien filed a supplemental report on 06/11/15.	
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input checked="" type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input checked="" type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: JF
		Reviewed on: 06/15/15
		Updates:
		Recommendation:
		File 18 - Dominguez

Petitioner

Maria De Jesus Torres De Porras (Pro Per – Daughter – Petitioner)

Attorney

Lisa Horton (Court appointed for Proposed Conservatee)

Petition for Appointment of Probate Conservator of the Person

			See petition for details.	NEEDS/PROBLEMS/COMMENTS: Court Investigator advised rights on 6/1/15 Voting rights affected – need minute order <u>Note:</u> It appears all defects previously noted have been cured.
Cont from 052115				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	W		
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.	W		
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
✓	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
✓	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 6/12/15	
			Updates:	
			Recommendation:	
			File 19 – De Torres	

Petition for Probate of Will and for Letters of Testamentary; Authorization to Administer Under the Independent Administration of Estates Act

DOD: 4/3/2006		STEPHEN A. MANELSKI , named executor without bond, is petitioner. Full IAEA – o.k. Will dated: 5/7/03 Residence: Fresno Publication: Fresno Business Journal Estimated value of the estate: Real property - \$84,120.00 Probate Referee: Steven Diebert.	NEEDS/PROBLEMS/COMMENTS: 1. Need name and date of death of deceased spouse. Local Rule 7.1.1D. 2. Need date of death of Thomas Manelski. Local Rule 7.1.1D. 3. #8 of the petition did not include the name and address of the Trustee of the Marie D. Manelski Revocable Living Trust. 4. Need proof of service of the Notice of Petition to Administer the Estate on the Trustee of the Marie D. Manelski Revocable Living Trust. Note: If the petition is granted, status hearings will be set as follows: • Wednesday, December 16, 2015 at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal. • Wednesday, August 24, 2016 at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.
Cont. from			
<input type="checkbox"/> Aff.Sub.Wit.	S/P		
<input checked="" type="checkbox"/> Verified			
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.			
<input type="checkbox"/> Notice of Hrg			
<input checked="" type="checkbox"/> Aff.Mail	W/		
<input checked="" type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.			
<input type="checkbox"/> Conf. Screen			
<input checked="" type="checkbox"/> Letters			
<input checked="" type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			
Reviewed by: KT			
Reviewed on: 6/15/15			
Updates:			
Recommendation:			
File 20 - Manelski			

Petition for Probate of Will and for Letters Testamentary

DOD: 12/25/13		<p>SHANNON SCOGGINS, named alternate executor, without bond, is petitioner.</p> <p>Named executor Robert Jennings is deceased.</p> <p>Full IAEA - ?</p> <p>Will dated: 4/16/04</p> <p>Residence: Fresno Publication: NEED</p> <p>Estimated value of the Estate: Real property - \$500,000.00</p> <p>Probate Referee: Steven Diebert</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need Affidavit of Publication.</p> <p>Note: If the petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> Wednesday, December 16, 2015 at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal. Wednesday, August 24, 2016 at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.</p>	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			S/P
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			W/
<input type="checkbox"/>	Aff.Pub.			X
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
			<p>Reviewed by: KT</p> <p>Reviewed on: 6/15/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 21 - Jennings</p>	

Petition for Appointment of Probate Conservator (person and estate)

Age:			NEEDS/PROBLEMS/COMMENTS: <div style="text-align: center;"><u>OFF CALENDAR</u></div> Pursuant to Request for Dismissal, the entire matter was dismissed on 6/11/15
DOD:			
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.	<input type="checkbox"/>	
<input type="checkbox"/>	Verified	<input type="checkbox"/>	
<input type="checkbox"/>	Inventory	<input type="checkbox"/>	
<input type="checkbox"/>	PTC	<input type="checkbox"/>	
<input type="checkbox"/>	Not.Cred.	<input type="checkbox"/>	
<input type="checkbox"/>	Notice of Hrg	<input type="checkbox"/>	
<input type="checkbox"/>	Aff.Mail	<input type="checkbox"/>	
<input type="checkbox"/>	Aff.Pub.	<input type="checkbox"/>	
<input type="checkbox"/>	Sp.Ntc.	<input type="checkbox"/>	
<input type="checkbox"/>	Pers.Serv.	<input type="checkbox"/>	
<input type="checkbox"/>	Conf. Screen	<input type="checkbox"/>	
<input type="checkbox"/>	Letters	<input type="checkbox"/>	
<input type="checkbox"/>	Duties/Supp	<input type="checkbox"/>	
<input type="checkbox"/>	Objections	<input type="checkbox"/>	
<input type="checkbox"/>	Video Receipt	<input type="checkbox"/>	
<input type="checkbox"/>	CI Report	<input type="checkbox"/>	
<input type="checkbox"/>	9202	<input type="checkbox"/>	
<input type="checkbox"/>	Order	<input type="checkbox"/>	
<input type="checkbox"/>	Aff. Posting	<input type="checkbox"/>	
<input type="checkbox"/>	Status Rpt	<input type="checkbox"/>	
<input type="checkbox"/>	UCCJEA	<input type="checkbox"/>	
<input type="checkbox"/>	Citation	<input type="checkbox"/>	
<input type="checkbox"/>	FTB Notice	<input type="checkbox"/>	
Reviewed by: skc			
Reviewed on: 6/15/15			
Updates:			
Recommendation:			
File 22 - Hultgren			

Petition to Determine Succession to Real Property (Prob. Code §13151)

DOD: 5/2/14		<p>KELLY MCNEAL, Granddaughter, is Petitioner.</p> <p>40 days since DOD</p> <p>I&A: \$145,000.00 (Real property located at 3761 N. Barton in Fresno)</p> <p>Will dated 8/6/12 devises the entire estate to Kelly McNeal (Petitioner).</p> <p>Petitioner requests Court determination that decedent's 100% interest in the real property passes to her pursuant to the decedent's will.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>	
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input checked="" type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			w
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 6/15/15	
			Updates:	
			Recommendation: SUBMITTED	
			File 23 - Lasko	